

PROCESSING PROCEDURES FOR A&E SOLE SOURCE APPROVAL

Follow these steps in order for a Sole Source Approval request valued from \$25,000-\$250,000 for Non-CIP Funded Contracts or from \$25,000-\$1M for CIP Funded Contracts (i.e. for A&E Consultant contracts awarding via an **e1544** or **ePA2625**):

1. Project Manager or Initiator (PM) contacts the Consultant Services Coordinator (CSC) John Mendivil in Public Works Contracts (PWC) to request a contract number be assigned to the Sole Source request and for the A&E Project Request Form.
2. PM drafts Sole Source Memo request addressed to PWC Deputy Director, Al Rechany from the PM's Deputy Director including the following:
 - a. Desired Consultant
 - b. Value
 - c. Duration
 - d. Justification/reason for Sole Source
 - e. List explanation as to why, per SDMC §22.3016, you are certifying that a sole source agreement is necessary, and that a strict compliance with a competitive process would be unavailing or would not produce an advantage, and soliciting bids or proposals would be undesirable, impractical or impossible.
3. PM sends draft Sole Source Memo request in Word format to Principal Contract Specialist, Cindy Crocker for review and approval to route for signature.
4. Once approved, PM routes Sole Source Memo request to their Deputy Director for signature.
5. Deputy Director or designee sends the signed Sole Source Memo request to Deputy Director Al Rechany to process for approval.
6. Once Sole Source is approved by Director James Nagelvoort, Cindy Crocker distributes approved Sole Source Memo to the cc list.
7. PM submits the following four items to CSC to obtain boiler agreement for Sole Source:
 - a. Completed A&E Project Request Form
 - b. Scope of Services
 - c. Approved HR Form
 - d. Approved Sole Source Memo
8. CSC provides PM boiler & Processing Procedures to Award Sole Source Contracts Not Requiring Council Approval.
9. PM refers to Processing Procedures provided by CSC for next steps to award Sole Source.

PROCESSING PROCEDURES FOR A&E SOLE SOURCE APPROVAL

Follow these steps in order for a Sole Source Approval request valued over \$250,000 for Non-CIP Funded Contracts or over \$1M for CIP Funded Contracts (i.e. for A&E Consultant contracts awarding via an **e1472** requiring Council Resolution or Ordinance):

****NEW streamlining requirement – PM must include Sole Source justification in the e1472 & Resolution/Ordinance to request authorization from Council to approve the Sole Source action.**

1. The PM requests the A&E Project Request Form from the Public Works Contracts (PWC) Consultant Services Coordinator (CSC).
2. PM submits the following items to CSC to obtain boiler agreement for Sole Source:
 - a. Completed A&E Project Request Form
 - b. Scope of Services
 - c. Approved HR Form
 - a. Email Statement from PM's Deputy Director that this will be a Sole Source contract requiring Council Approval confirming the justification/reason for Sole Source and explanation as to why, per SDMC §22.3016, a sole source agreement is necessary, and that a strict compliance with a competitive process would be unavailing or would not produce an advantage, and soliciting bids or proposals would be undesirable, impractical or impossible will be included in the e1472 & Resolution/Ordinance requesting Council to approve the Sole Source action.
3. CSC provides PM contract number, boiler & Processing Procedures to Award Sole Source Contracts Requiring Council Approval.
4. PM refers to Processing Procedures provided by CSC for next steps to award Sole Source contract.